Planning Section Chief

Home Study Training

Planning Section Chief

The Planning Section Chief (PSC) is responsible for determining the efforts of the incident (Search, disaster response, etc) in the next operational period, determining incident intelligence including interviews, weather, hazards, status of roads / airfields, etc; and for requesting and signing in resources to the incident. The PSC is a member of the Command and General Staffs, works very closely with the Operations Section Chief (OSC) and reports to the Incident Commander. If fully PSC qualified individuals are available to assist the PSC they are called "Deputy Planning Section Chiefs", individuals in training are referred to as "Assistant Planning Section Chiefs". CAP PSC's must be appropriately trained and credentialed in accordance with CAPR 60-3.

During SAR incidents, the PSC position may not be separately staffed. Subordinate positions such as the Check-In/Status recorder, Resources Status Unit Leader, etc may need to be filled at least part-time. The entire planning function ultimately must be performed, by the IC if no one else is available; or the PSC and OSC functions may be filled by the same single person.

The procedures, forms and tasks specified here apply whether an individual is filling only one role or several. During disaster incidents specially, the PSC is a key member of the Command Staff, and should be staffed by qualified individuals with subordinate positions filled (see below). Electronic aids such as the MMU can be used to assist the PSC and other staff functions, but users must become familiar with them before assignment.

The PSC may have several subordinate positions, including (but not limited to) the Resources Status Unit (RESTAT), the Situation Status Unit (SITSTAT), Documentation Unit and Demobilization Units (probably never used within a CAP incident) and various technical intelligence specialists (such as the mission intelligence and mission weather teams, etc). The duties of the RESTAT and SITSTAT will be discussed below. The PSC is also responsible for gathering the information and preparing the Incident Action Plan (IAP) for the IC. For additional information on the IAP, refer to CAPR 60-3 para 8-10.

During a SAR or disaster incident, the PSC is responsible for collecting intelligence information (including weather data, road data, and interviews. During SAR incidents, the PSC is also responsible for requesting additional technical resources such as NTAP (National Track Analysis Program). Further discussion of these resources will follow.

Disaster Incident Specific Roles and Responsibilities:

In a disaster incident, an Agency Liaison (AL) may be located at the EOC, and review and accept task assignments from various supported agencies for CAP. Other agencies without a presence at the EOC may also task CAP, and CAP may task itself for support roles (for instance, pick up a fly-away radio kit and transport it to the search base). Whether an AL is assigned or not, when a task assignment is received at the base, the PSC receives incidents from the EOC or other approved source, and logs them into the Task Log (CAWG F 25). The PSC then reviews them to insure they are appropriate for CAP's use. If they are inappropriate for CAP, they are returned to the requestor, noted on the task log as being returned, and an entry is made in the

Planning or IC journal indicating the reason they are returned. Sometimes, tasks have to be returned because they lack sufficient information for the task to be completed. Locally (CAP generated tasks) are handled with the exact same process as agency generated tasks, by the requesting individual preparing a Task Record and giving it to the PSC. Task assignment sheets (CAWG F 25 and 25A) are not used in SAR incidents. Refer to attachment 6 for a diagram of the task request paperwork flow.

When a task is received at the first CAP echelon (AL or PSC), either the AL or PSC will review it to insure that it is within CAWG's capabilities at that time, that all information needed to complete the requested task is present, including who is the requestor (name, agency, phone number or other contact information), what information is needed, when it is needed by, etc. CAWG F 25A will be used to record the task information. The Task number will be assigned at this level, each unique task from a requestor has a unique task number. If it is necessary to subdivide a task request from a requestor, the individual tasks retain the original number, with a letter suffix (A, B, etc) to provide a unique identifier.

If text messaging over radio (packet or other technology) allows text transmission of the task from the EOC to the disaster base, the message will be formatted in the same order as the CAWG F 25A by the text messaging operator. Refer to "Disaster Communications Procedures" for additional information on text messaging systems. The responsibility of installing text messaging radio systems is with the Communications Unit Leader (CUL) under the OSC, the operator at the EOC (if installed) is the AL, and no operator is required at the mission base.

If the task is appropriate and there is sufficient information that it can be worked, the PSC and OSC (if there is one) discuss it to determine the relative priority of tasks being worked and waiting to be worked, and the best way to complete the task. Some tasks from a customer may require several different CAP resources to complete, for instance a task to "check via air 10 reservoirs in the area" may best be handled by several different aircraft sorties. The PSC and OSC will break down the tasks appropriately, and number the subordinate tasks with successive alpha characters to maintain visibility and tracking – for example, task #12 ("perform aerial check of the following 10 lakes, dams and reservoirs, report any apparent damage or leaks") may be broken into three sorties, which would be labeled 12-A, 12-B, and 12-C. Likewise, tasks from different agencies may be able to be completed by the same resource, that resource would then be labeled with both tasks (Task 12A/15C, for example).

Some task requests may be assigned to both air and ground resources, the same numbering scheme is used (14A – perform air reconnaissance on Interstate 5", 14B "Check bridge overpasses for clearance or damage on Interstate 5 between Buttonwillow and Mettler"). In this case task 14B would be a ground resource task. The PSC and OSC will determine which kinds of resources should be tasked, and then the Task Record is given to the OSC for action. The PSC must maintain a record of the task and monitor its status, however.

If time allows, such as when preparing tasks for the next operational period, the PSC and OSC can begin filling out the CAWG F 104 or 109 with mission tasking as appropriate, and then the forms are completed by the responsible Ops section member when the resource is assigned and briefed. The PSC does NOT assign or monitor specific resources, the OSC and subordinates do.

Since the PSC and OSC may have to assist each other, each should be aware of the other's roles and responsibilities. The PSC also acts as an interface with the requesting agencies to determine relative priority of tasks, report problems and completion, etc.

The individual task request numbers are maintained on the CAWG F 25, and the combined and subordinate individual task numbers are used on the CAWG F 25A, CAWG F 104 (Mission Flight Plan), CAWG F 109 (Ground Ops Assignment), etc. Copies of the CAWG F 25A's should be provided the OSC for tasking to the AOBD or GBD (if assigned), the PSC should maintain a master copy of all task requests. When text over radio systems are used, multiple part paper may be used to make copies, the last page of the multiple part set is retained at the printer as the master copy.

The PSC must maintain absolute control over the incoming tasks, at all times. All tasks must be logged on the CAWG F 25, and the status information maintained on the form and status board. The task of keeping status boards current may be assigned to the RESTAT (see below). The PSC should keep the CAWG F 25 (paper form) up to date, and the RESTAT or other individual uses that master copy to update all status boards.

Working with the OSC and IC, the PSC is notified of any relevant information concerning the tasks – including the completion of the task. When the task is completed (or when significant portions of the task are completed) the PSC notifies the requesting agency via written message. Report (CAWGF 25A), and entered into the PSC or IC journal. Operations should also inform the PSC of the time tasks are started, and when a team has been assigned, briefed, launched, etc. If there is any delay in completing a task, so the requesting agency can be notified and any required re-prioritization can happen.

The PSC collects, analyzes and distributes any important intelligence information, including current and forecast weather, airspace or road closures, specific air or ground hazards, etc. Much of this information should be posted as soon as received on the appropriate status boards at the base. Some status boards are duplicated in different areas of the base, for instance general briefing boards are located in staging areas and in the check-in area, hazards are noted on boards in staging and briefing, as well as ops and planning. During a disaster keeping these boards updated is a time consuming task, but it needs to be done.

If possible, the CAP incident base should receive tasking from appropriate EOC or agency only in written form – via email, fax, or CAP provided electronic means such as packet radio or other technology. If needed, the PSC, OSC and IC should consider assigning CAP comm resources to provide this electronic link at the EOC. If tasks can't be sent in text format, a specific individual and specific communications link (special telephone number, unique radio frequency, etc) should be used, and the person(s) receiving the tasking should be chosen for their maturity and ability to copy messages **exactly** as transmitted. For further information on communications procedures, refer to "Disaster Communications Procedures Checklist".

SAR Incident Specific Roles and Responsibilities:

During a SAR incident, the PSC is more involved with developing intelligence via the mission intelligence team, mission weather team, interview teams, and via technical resources like TAP analysis which could mean you are responsible for all these tasks. The PSC also determines the overall total POD for the areas searched, and determines the need (with the OSC) to re-search particular areas. The PSC develops a list of potential search areas for the next operational period, and can begin preparing mission tasking packages for completion by Operations when assigned.

During any incident, any relevant information such as leads or clues, or new hazard information, is given to the PSC immediately. Leads or clues are recorded in the Lead Log (CAWG F xx) immediately on receipt. The time the lead is received is recorded, and the lead is assigned the next sequential number on the log. Leads are logged and recorded in the order they are received at the base, no matter when they may have been collected in the field, then posted in a specific "clue log" (CAWG form xx) in chronological order, and are provided to follow-on staff members. The PSC, OSC and IC review all reported leads, clues, hazards or other information and determine the appropriate response.

Weather information for the time the search target was estimated lost can be found at the California Wing Weather site, http://wx.cawg.cap.gov. This site maintains aeronautical weather reports for the entire state for the 10 days. You should record (print out) the weather information that is of interest as soon as possible, since the site will update and delete any weather information older than 10 days. Other weather information can be acquired by calling the FAA Flight Service Station weather line (1-800-wx-brief). Be sure to identify yourself as a CAP member working a search.

Intelligence. The PSC is responsible for collecting and analyzing mission intelligence, including interviews of the missing pilots family and acquaintances, flight instructor, aircraft mechanic, co-workers, and others who might have casually seen the pilot during some phase of flight, including the interviews that ground teams might perform in the search area.

The IC can request specific help from the CAWG Mission Intel team.

Ground teams will normally record the results of an interview on CAP F 106 (Ground Interrogation Form) but are trained to NOT record the information in front of the interviewee. The ground team can relay most information via insecure radio, but any personal information, especially names and telephone numbers of the interviewee must be relayed via a secure link (wire telephone or paper).

NTAP. The National Track Analysis Program (NTAP) is an excellent tool for locating a crashed aircraft, but it has limitations. The NTAP is based on following the radar target of the missing aircraft from a point that it can be identified on the radar (usually during some sort of radar service) to the point it is no longer being tracked by radar. Often, the aircraft will be located near the last known NTAP point. Limitations of the NTAP include first identifying the aircraft in question. An aircraft departing an uncontrolled field on a VMC flight may not be able to be identified. Identifying the specific VFR or transponder code 1200 aircraft may be very difficult or impossible, resulting in more than one aircraft track to be analyzed. The FAA may not have

resources available to perform the analysis quickly, resulting in additional delays. Finally, the aircraft may have been tracked, but entered an area of poor or non-existent radar coverage due to elevation or terrain.

To request an NTAP, confirm that the IC hasn't already done so, and then contact the appropriate FAA Air Traffic Control Center for the area in question. Identify yourself as a CAP member working an active missing aircraft search. If necessary, contact the Air Force Rescue Coordination Center and ask them for assistance. Be sure to clear any contacts with the FAA or USAF with the IC prior to making them.

When an NTAP is developed, a program can be used to graphically show the terrain at the end of the TAP. This program, SARVIEW, is available through specific individuals within CAWG, contact the IC for assistance. Another program, RADARVIEW, can be used to interpret radar data from the FAA.

All Incident PSC Roles and Responsibilities:

The PSC maintains all mission documentation including the PSC section log (ICS 214), and maintains accountability for assigned subordinate positions. The PSC participates in Command and General Staff briefings, and maintains unit documentation including Task Logs (CAWG F xx), copies of tasks received, Incident Action Plans, etc. and provides them to the follow-on staff at shift change.

To maintain the various documents, the PSC should establish a robust paperwork system that includes at least the following:

- Disaster Task Log (CAWG F 25)
- Individual Tasks received, and disposition of them (in a folder or other device)
- Lead Log (CAWG Form xx)
- Lead Reports (CAWG Form 22H) (in a folder or other device)
- Task Status Board (may require more than one status board. The responsibility for keeping status boards up to date should be delegated to the SITSTAT unit if assigned.
- Incident Log (CAWG F ICS 214), kept in chronological order throughout the day

CHECKLIST *PRIMARY RESPONSIBILITY*
1. Briefing on situation and resource status..... PSC
2. Set objectives..... IC
3. Plot control lines, establish division boundaries,
identify group assignments. .....……..OPS
4. Specify tactics/safety for each division ..... SO, OPS
5. Assign resources needed by Division/Group ..... OPS, PSC
6. Specify Operations facilities and reporting
locations - Plot on map ..... OPS, PSC,
LSC
7. Place resource and personnel order..... LSC
8. Consider Communications, Medical, Site Safety,

and Traffic Plan requirements..... SO, PSC, LSC
9. Finalize, approve and implement Incident
Action Plan..... PSC, IC, OPS

IC = Incident Commander
PSC = Planning Section Chief
OPS = Operations Section Chief
LSC = Logistics Section Chief
SO = Safety Officer

Subordinate Position Roles and Responsibilities:

Within the Planning Section, the PSC has certain subordinate positions. **THE RESOURCES UNIT LEADER (RESTAT)** is responsible for maintaining the status of all assigned resources (primary and support) at an incident. The RESTAT position is not an identified ES specialty, but if resources allow an individual should be selected to fill this position. The RESTAT Unit Leader is a section leader responsible for the personnel assigned to both the Check-In/Status and SITSTAT functions (see below). The position requires a certain amount of familiarity with ES operations, and the ability to print neatly on status boards. A Mission Staff Assistant (MSA) can be used to fill this position, consistent with the leadership and managerial skills required.

The RESTAT and its subordinate sections are responsible for maintaining control of the mission resources. This is achieved by overseeing the check-in of all resources, maintaining a status-keeping system indicating current location and status of all resources, and maintenance of a master list of all resources, e.g., key supervisory personnel, primary and support resources, etc. While smaller SAR incidents most likely don't require specific individuals performing these unique roles, larger SAR incidents (especially SAREX's) and all DR incidents require them. The RESTAT leader coordinates requests for additional resources with Group Alerting Officers or Regional Resource Coordinators, utilizing available communications systems. Since you may not have someone to perform this task and you may end up with it, it is strongly recommended that you read the Logistics Section Chief Course to be familiar with this area.

On assignment, the RESTAT leader should:

a. Review Common Responsibilities (CAPR 60-3 para 8-12)
b. Review Unit Leader Responsibilities. (ICS FOG page 1-3)
c. Establish check-in function at incident locations. The RESTAT personnel performing check in may be further subordinated into a check-in unit (see below).
d. Prepare Organization Assignment List (CAWG ICS Form 203) and Organization Chart (ICS Form 207).
e. Prepare appropriate parts of Division Assignment Lists (ICS Form 204).
f. Prepare and maintain the Command Post display (to include organization chart and resource allocation and deployment).
g. Maintain and post the current status and location of all resources.
h. Maintain master roster of all resources checked in at the incident.
i. A Check-in/Status Recorder reports to the Resources Unit Leader and assists with the accounting of all incident assigned resources.

CHECK-IN/STATUS RECORDER Check-in/Status recorders are needed at each check-in location to ensure that all resources assigned to an incident are accounted for. There is no specific ES qualification for Check-in/Status recorder; any qualified individual may perform this function. Ideally, this function can be performed by MSA's or by F/ASC qualified individuals.

If available, an automated tracking system such as the MMU should be used to log personnel and resources into the incident, and verify qualification. If an automated system for verifying qualifications isn't used, the check-in/Status recorder must be completely familiar with

qualifications for various ES specialties required in CAPR 60-3 and CAPR 60-4 vol II, as well as other CAP regulations, and have copies of these regulations available for review.

All resources should be tracked as complete resources – i.e. when individual parts of a resource (such as an observer without aircraft and pilot) are at the base, they are not recorded as resources, until they are complete. The Check-In/Status Recorder should assist people in forming complete resources; but should maintain a separate tracking system for these partial resources. The Check-In/Status recorder should be able to report to the PSC, IC or any other staff position the number of personnel, vehicles and aircraft signed in at any time, and the number and status of complete resources. The Check-In/Status recorder should have a status board available showing the resources, separated by type (Aircrew, Ground Team, Comm, Base, etc) and by status.

Resources are tracked in one of three categories, Available, Assigned or Unavailable. Assigned means they are presently assigned to a task, sortie or assignment. Unavailable means that they are neither assigned nor available – for instance, while eating lunch, fueling vehicles or aircraft, etc. "Available" means that the resource (crew, team, etc) is fully ready to go – the vehicle is fueled and inspected, the crew has loaded their equipment and the only remaining step is for the crew to be tasked by operations.

Check-In/Status Recorder Responsibilities:

The Check-In/Status Recorders should:

a. Review Common Responsibilities (CAPR 60-3 para 8-12), "Disaster Responder Responsibilities"

b. Obtain from your mission kit, the PSC, IC or LSC the required materials, including Check-in Lists (ICS Form 211 / 218 or CAPF 103/121), Resource Status Cards (if used) ICS 219), and status display boards.

c. Establish communications with the Communication Center and Ground Support Unit, inform them of your location.

d. Post signs so that arriving resources can easily find incident check-in location(s). Posting signs is generally the responsibility of the LSC or Base Manager, but check-in may be working before they arrive.

e. Record check-in information on Check-in Lists (CAWG ICS Form 211).

f. Transmit check-in information to RESTAT or PSC on a regular pre-arranged schedule or as needed.

g. Forward completed Check-in Lists (CAWG ICS 211) and Status Change Cards (ICS 210) (if used) to the Resources Unit at the end of each operational period.

h. Receive, record, and maintain resource status information (on Resource Status Cards, (ICS 219, if used) or by other means for incident assigned single resources, strike teams, task forces, overhead personnel, and remote launch personnel.

i. Maintain files of Check-in Lists (CAWG ICS 211, etc).

Situation Status Unit Roles and Responsibilities:

The collection, processing and organizing of all incident information takes place within the Situation Unit (SITSTAT). The Situation Unit may prepare future projections of incident growth,

maps and intelligence information. The SITSTAT is not a defined ES Specialty, and may be filled by any ES qualified individual. The individuals selected should have some familiarity with CAP ES mission activities, and be able to print neatly on status boards. The SITSTAT is responsible for updating mission status boards throughout the mission base.

On assignment the SITSTAT leader should:

a. Review Common Responsibilities (CAPR 60-3 para 8-12)
b. Review Unit Leader Responsibilities (ICS FOG page 1-3)
c. Begin collection and analysis of incident data as soon as possible.
d. Prepare, post, or disseminate resource and situation status information as directed by the RESTAT, PSC or other staff officer.
e. Prepare the Incident Status Summary Form (ICS Form 209).

Attachment 1 – Disaster Task Summary (Sample, actual form size different)

Disaster Task Summary **CAWG Form 25**	Incident Number:	Date:	Incident Base:	Page of Pages

Task Number	Requesting Agency	Assigned to	Date / Time (LCL)				
			Rec'd	Assigned	Agency Notified	IC signed	Completed

This form is used both as a paper form and as a Status Board when it's enlarged to suitable size.

CAWG Form 25 June 02 Previous Editions Are Obsolete

Attachment 2 – Disaster Task Report (sample, actual form size different)

Disaster Task Report	Incident Name / Number:	Incident Base:	Date /Time Rec'd: (local)	Task No.
Requesting Agency:	Contact:		Contact Phone:	
Assigned to: Time (local):	Task Description:			

Time (LCL)	Activity log

This task has been completed

_____

IC signature

CAWG Form 25a June 02

Attachment 3 – Incident Log (Sample, actual size different)

Incident Log **CAWG ICS 214**	Incident Name / Number:	Incident Base:	Date Prepared:	Page of Pages
Incident Commander:	Prepared By (Print)		Duty:	

Time (LCL)	Remarks

CAWG ICS 214 June 02

Attachment 4. Planning Mission Kit Checklist

Status Boards (Laminated)

- ❑ Task Assignments (CAWG F 25)
- ❑ Area Map and/or Chart, copies in Planning, Ops, Staging
- ❑ Local Weather, copies in Planning, Ops, Staging, Comm
- ❑ Local Hazards, copies in Planning, Ops, Staging, Comm
- ❑ CAWG ICS Form 201 Incident Briefing, copies in Planning, Staging
- ❑ ICS Form 207 – Incident Organizational Chart, copies in Planning, Staging, Comm

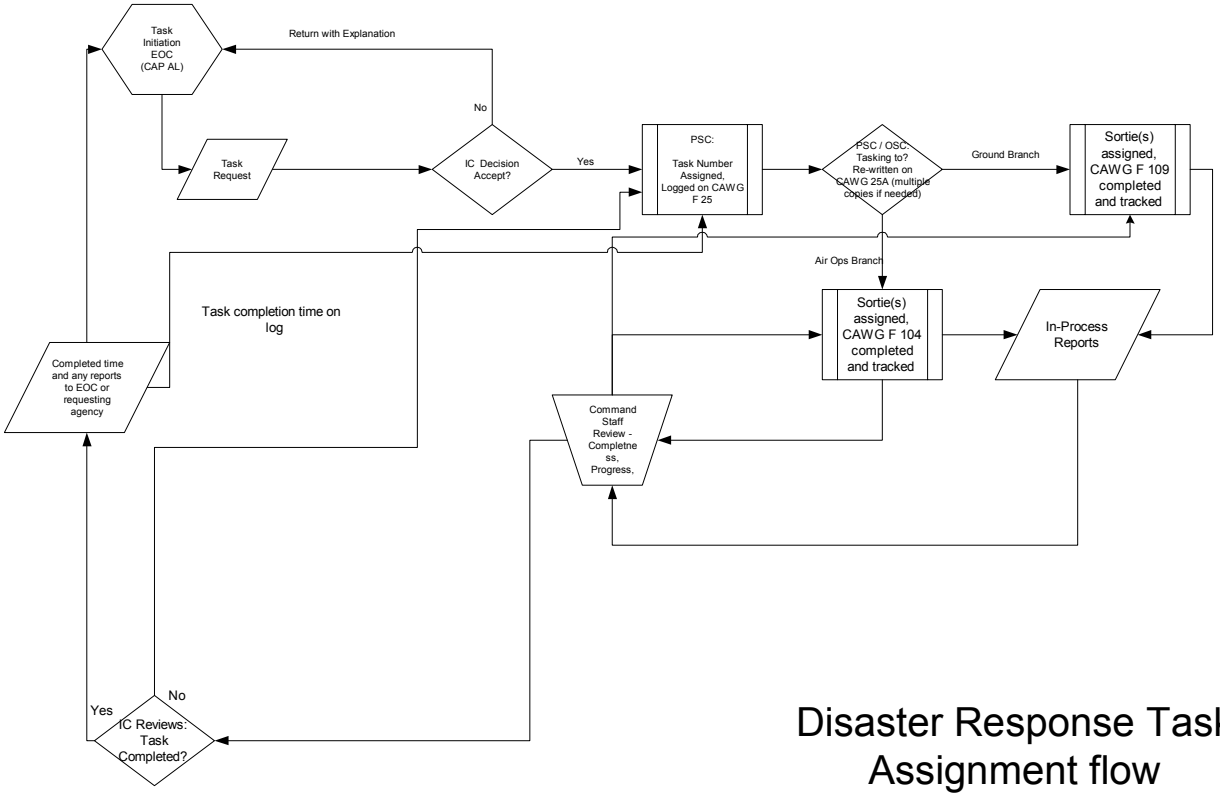
Forms:

- ❑ CAWG ICS 214 – Unit Log
- ❑ CAWG ICS 201 – Incident Briefing
- ❑ CAWG ICS 202 – Incident Objectives
- ❑ CAWG ICS 203 – Organizational Assignment List
- ❑ ICS 204 – Assignment List
- ❑ CAWG ICS 207 – Incident Organizational Chart
- ❑ CAWG - ??? Resource Summary
- ❑ CAWG – 25 Task Log
- ❑ CAWG – 25A
- ❑ CAWG ICS 214 – Incident Log
- ❑ Message Forms or message book

Supplies –

- ❑ Adhesive labels
- ❑ Airport Guide
- ❑ Aviation Plotter
- ❑ Ball point pens (black)
- ❑ Base Signage Kit
- ❑ Calculator (recommend solar power)
- ❑ Clip boards
- ❑ County or area maps
- ❑ De Lorme Atlas (No Cal, So Cal)
- ❑ Drafting or Masking tape
- ❑ Flashlight with batteries
- ❑ Gridded Aeronautical Charts (laminated)
- ❑ Highlighters – 3 different colors
- ❑ Laminate board markers
- ❑ Laminated California Road Map
- ❑ Large permanent markers (sharpie)
- ❑ Magnifying glass
- ❑ Manila File Folders
- ❑ Mechanical pencils with erasers
- ❑ Paper Clips
- ❑ Poster Paper
- ❑ Post-It pads (2x2 minimum), various colors
- ❑ Push Pins
- ❑ Regs, in binder: CAPR 60-series, ICS Field Ops Guide
- ❑ Scissors
- ❑ Scotch Tape
- ❑ Small tape recorder, with batteries and tape, ready to go
- ❑ Staple Remover
- ❑ Stapler and Staples
- ❑ Straight Edge (18”)
- ❑ White Board Markers

Attachment 5. Disaster Task Request Flow Diagram



Attachment 6. Valuable Links for the PSC:

FireScope ICS publications:	http://firescope.oes.ca.gov/
CAP Regulations:	http://www.capnhq.gov/documents/webregulations/pubsweb.htm
CAP Forms:	http://mswg.cap.gov/capforms/capforms.html
California Wing publications:	http://www.cawg.cap.gov/html/Pubs/publicat.htm
California Weather Reports for the last 2 weeks:	http://wx.cawg.cap.gov